

## What's New in CoreTrac 4.2?

### **Some of the new features to the Goals and Compensation area include:**

- Two new goal types, allowing you to measure the success ratio of both referrals sent against production accounts open, and successful referrals against production accounts open
- An enhanced goal widget which allows end users to more easily see their progress against key targets with information including the target itself, the actual, the goal name and a pictorial reference of how much progress has been made
- For Administrators, when adding new goals and compensation plans there are now new options to select multiple products within a single product type. You are no longer constrained to adding a single product or all products within that one product type
- We've also added new options to create user based goals which are part of a larger branch target, so you can track an individual's contribution to that overall target for more granular insights into performance

### **You asked: we listened. We've taken your feedback to reintroduce some helpful features to CoreTrac. We have:**

- Reintroduced search options that focus on retail and commercial contact searches so users have a better and more optimized way to navigate the contact database
- Reintroduced the option to save and close. When users add notes, events and tasks, these key activities can be quickly and efficiently saved to the database, shaving time off your regular tasks so you can focus more on your customers
- We've optimized the process of how URL links can be added to the organization widget within the action center, so you can get to this much more quickly
- The option of referring contact has been standardized so that it is now available and viewable in the standard referral and pipeline reports, meaning more accuracy when it comes to identifying where your leads have originated from

Thank you for your continuing feedback. Please keep sending this through and we will keep listening and driving CoreTrac forward to meet your needs. You can expect more frequent updates to CoreTrac through our new Factory development model, keeping your business at the cutting edge of innovation and ahead of the game.

To learn more about CoreTrac 4.2, ask your Account Manager or contact us at [info@avolin.com](mailto:info@avolin.com). We're looking forward to helping you on the road to true CRM efficiency.